

“opinionway for **tallan**o
technologie

Pan-European study on air pollution

June 2022



ESOMAR²²
Corporate





Methodology



“ Methodology



France

1,001 individuals

A representative sample of the population aged 18 and over (according to sex, age, socio-economic category (SEC), type of conurbation and region of residence)



Germany

1,000 individuals

A representative sample of the population aged 18 and over (according to sex, age, income and region of residence)



Italy

1,001 individuals

A representative sample of the population aged 18 and over (according to sex, age and region of residence)



Belgium

1,002 individuals

A representative sample of the population aged 18 and over (according to sex, age, language and region of residence)



Netherlands

1,003 individuals

A representative sample of the population aged 18 and over (according to sex, age and region of residence)



The five samples were surveyed via a **self-administered on-line questionnaire** using a **CAWI system** (Computer Assisted Web Interview).



Interviews conducted
03 to 13 June 2022.

Interviews conducted
08 to 14 June 2022.

Interviews conducted
08 to 14 June 2022.

Interviews conducted
10 to 14 June 2022.

Interviews conducted
08 to 14 June 2022.

Representation of significant differences: In this study, the significant differences tested using a 10% threshold will be indicated, as will any difference **higher** or **lower** than the four other countries.

An arithmetic average of the 5 countries surveyed is also presented, taking into account all the respondents (5007 individuals).



OpinionWay conducted this survey by applying the rules and procedures established in **ISO 20252**



All interpretation of this survey's results must allow for margins of uncertainty: 1 to 3 points at the most for a sample of 1,000 respondents.



Any publication, in full or in part, MUST use the following wording in its entirety:

“OpinionWay survey for Tallano”, and no reference to or revision of the survey may be made without citing this wording.



Results





01

Environmental and health concerns of Europeans, convergences but also differences between countries



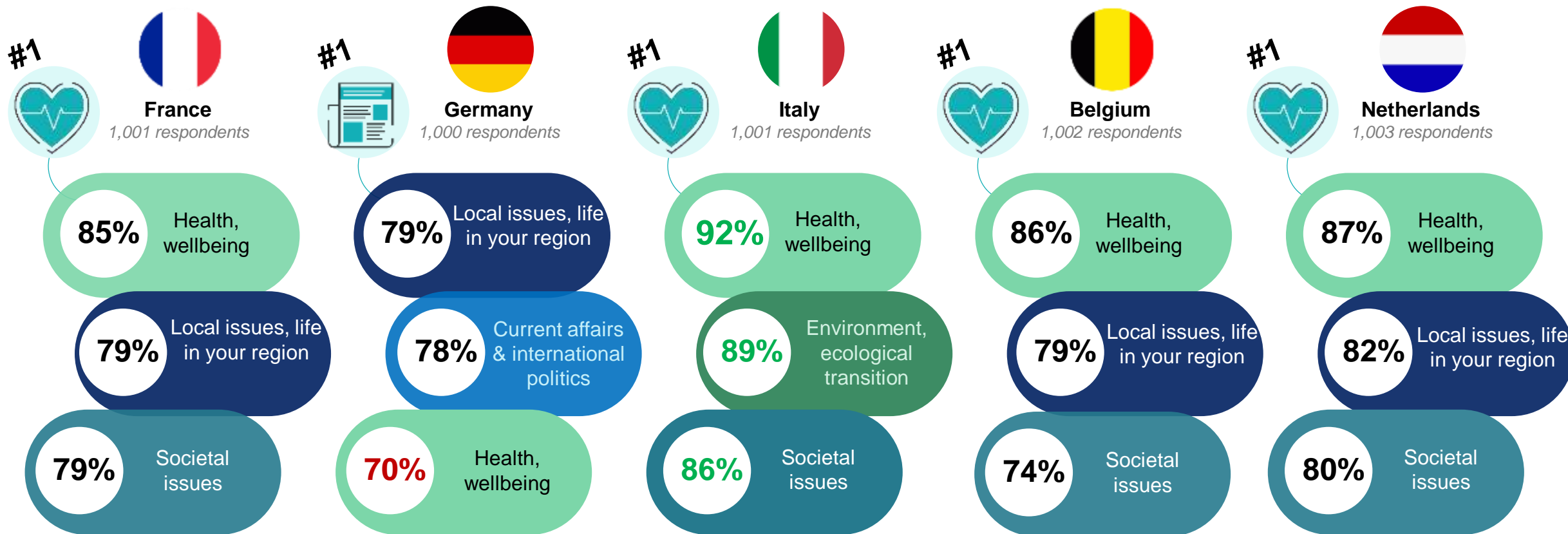
A Health is the main concern of the Europeans surveyed. There is a more marked interest in ecological issues in Italy that is less apparent in Germany



“ Health: the main concern of French, Italians, Belgians and Dutch.

B1: Let's now discuss issues that are of interest or concern to you. For each of the following, please indicate your level of interest or concern: Very, Somewhat, Not very or Not at all.

TOP 3 per country, as % of respondents "Very+Somewhat" interested



Ecology is in the top 3 in Italy but seems to be less of a concern in Germany.

B1: Let's now discuss issues that are of interest or concern to you. For each of the following, please indicate your level of interest or concern: Very, Somewhat, Not very or Not at all.

Very

Very+Somewhat



France

1,001 respondents



Germany

1,000 respondents



Italy

1,001 respondents



Belgium

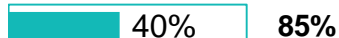
1,002 respondents



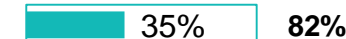
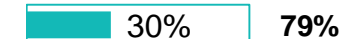
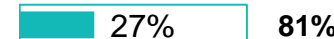
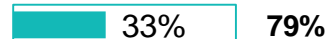
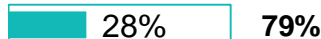
Netherlands

1,003 respondents

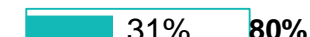
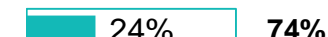
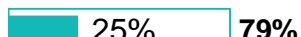
Health, wellbeing



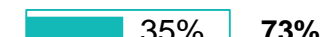
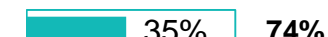
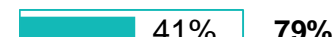
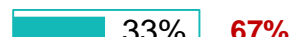
Local issues, life in your region



Societal issues



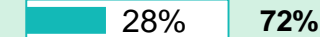
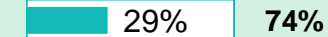
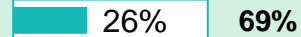
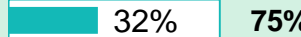
Travel, tourism



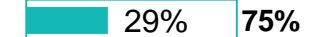
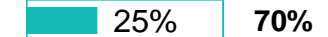
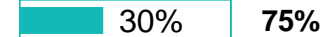
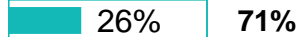
Culture, leisure (literature, movies, music, art, entertainment, etc.)



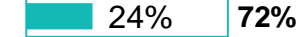
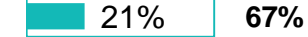
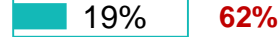
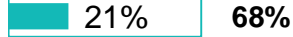
Environment, ecological transition



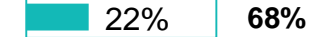
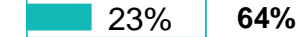
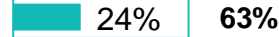
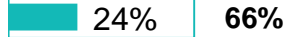
Current affairs and international politics



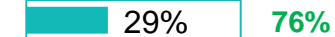
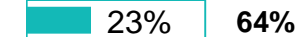
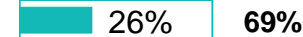
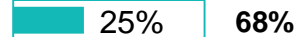
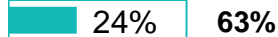
Economy, employment



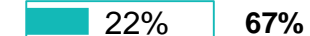
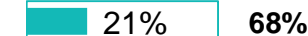
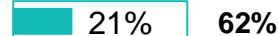
New technologies



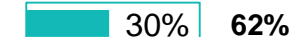
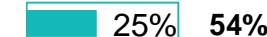
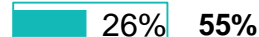
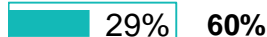
Domestic policy



Science



Sport

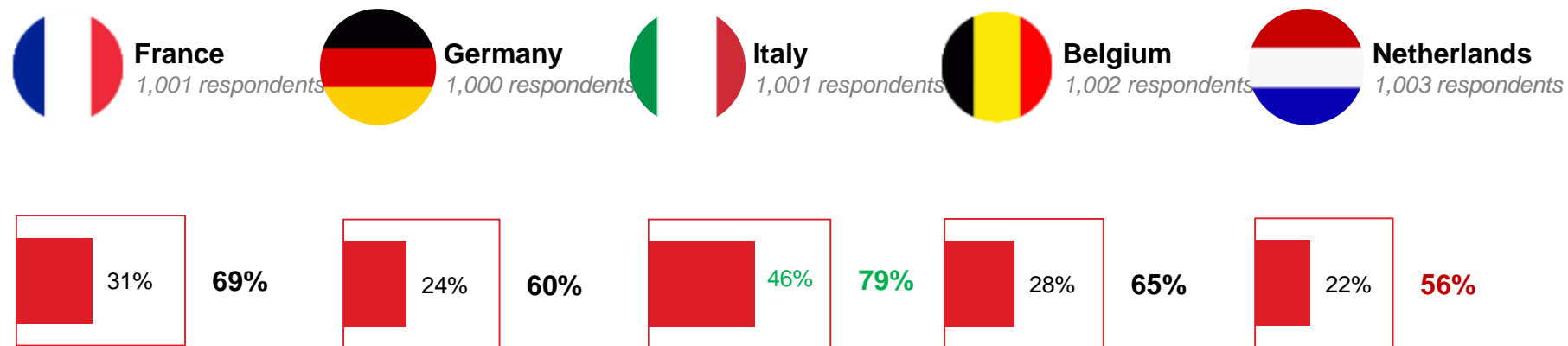




Air pollution is a concern for 66% of Europeans. While France and Belgium are in line with this average, it is expressed more by the Italians and less by the Germans and Dutch.

C1: Would you say that each of the following environmental issues concern you: Enormously, Very, A little, Not really or Not at all?

- Enormously
- Enormously+Very



Outdoor air pollution, indoor air pollution (houses and other buildings) and air pollution in confined spaces (metro stations, commuter trains, etc.)



66%

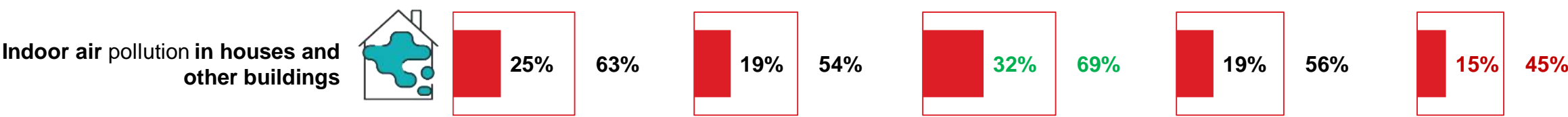
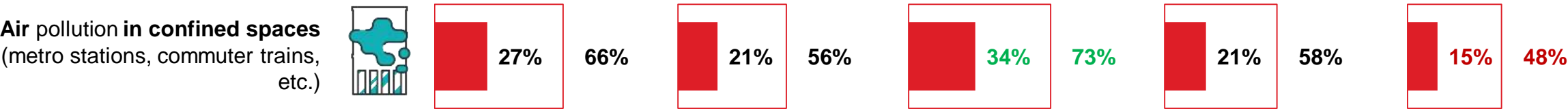
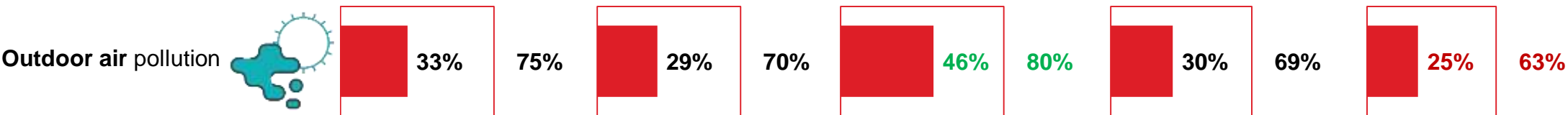
of Europeans surveyed are very concerned (enormously and very) about air pollution.



For those concerned about air pollution, outdoor air is the issue most frequently cited among Europeans surveyed.

C2: More specifically on the issue of **AIR POLLUTION**, would you say that each of the following aspects concerns you:
Enormously, Very, A little, Not really or Not at all?
Base: those concerned at least a little by air pollution

- Enormously
- Enormously+Very





B

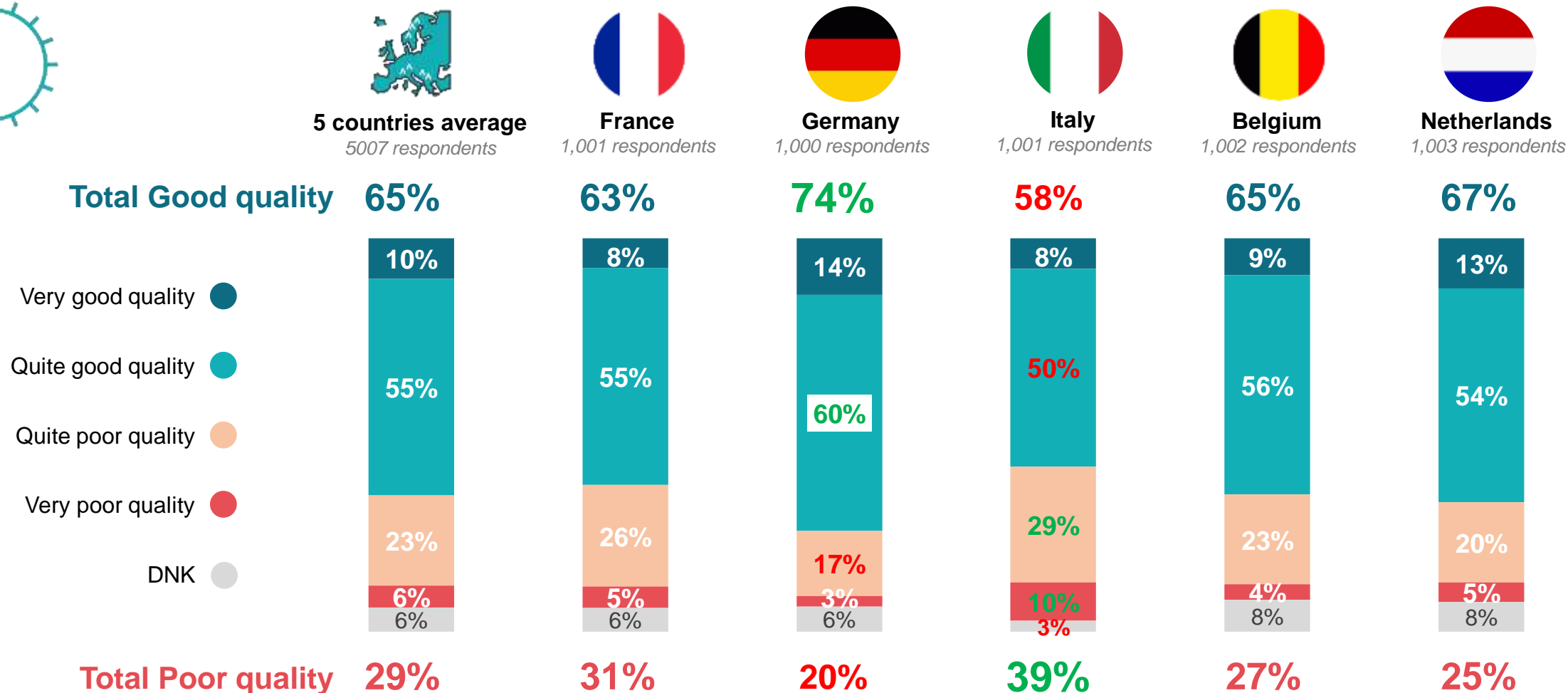
Air pollution seems to be a
“sensitive” issue in Italy





Almost 3 out of 10 Europeans consider the quality of the outdoor air near their place of residence to be poor. This assessment is more pronounced among Italians and less in Germany.

D1: In your opinion, the outdoor air quality of the place you live most of the time is generally...





Nevertheless, 82% of the inhabitants questioned said they were worried about the risks linked to outdoor air quality.

D6: Lastly, would you say that the risks associated with outdoor air quality are a concern to you?



5 countries average
5007 respondents



France
1,001 respondents



Germany
1,000 respondents



Italy
1,001 respondents



Belgium
1,002 respondents



Netherlands
1,003 respondents

Average Score

6,9

6,8

6,5

7,6

6,9

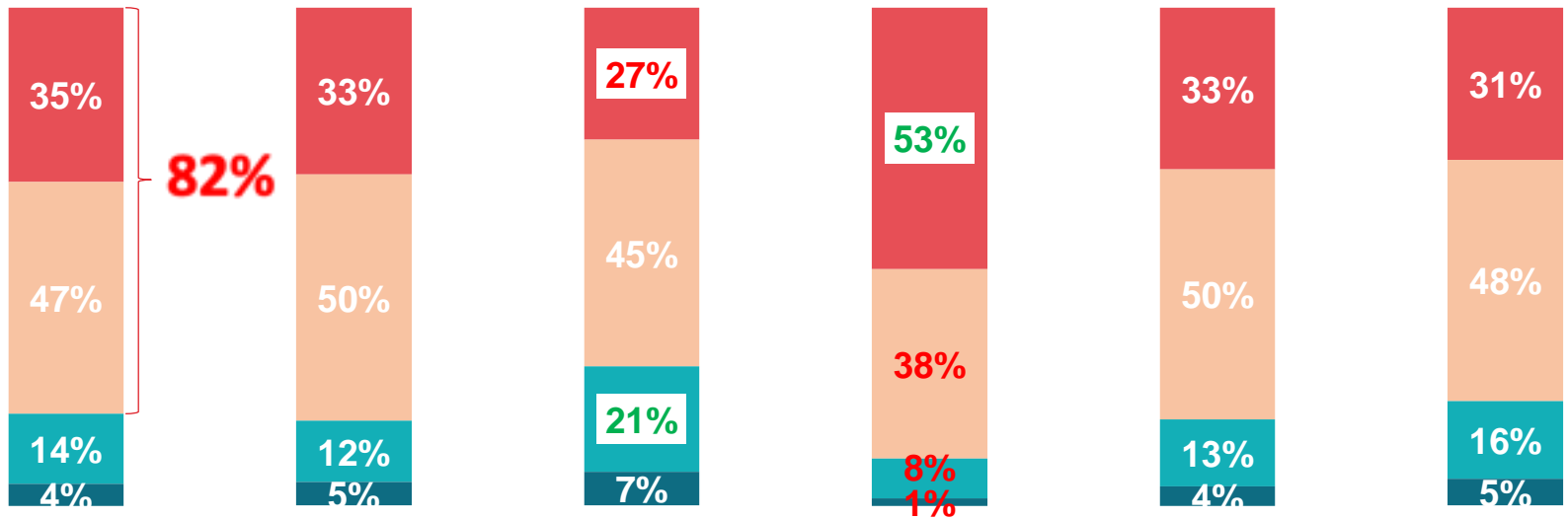
6,7

VERY CONCERNED - Scores 8 to 10

SOMEWHAT CONCERNED - Scores 6+7

NOT REALLY CONCERNED - Scores 4+5

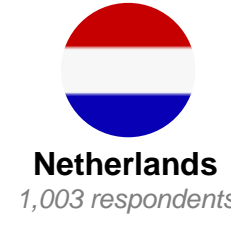
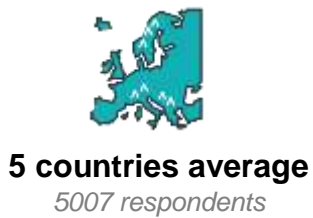
NOT CONCERNED AT ALL - Scores 1 to 3





41% of respondents have already experienced or seen family or friends experience problems associated with outdoor air pollution. This is slightly less so in Germany and even less the case in Italy

D5: Have you, a member of your family or a friend already suffered or experienced discomfort or problems associated with outdoor air pollution?



Total Yes

41%

48%

38%

31%

44%

46%

- Yes, often ●
- Yes, sometimes ●
- No, rarely ●
- No, never ●

Total No

59%

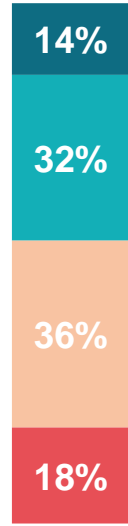
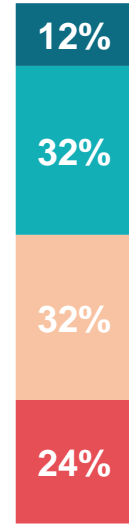
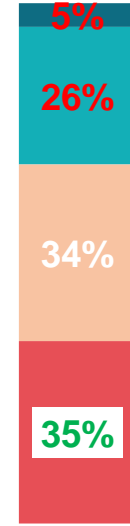
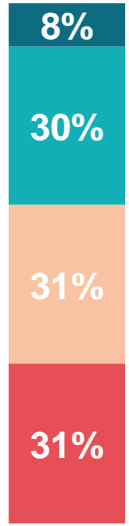
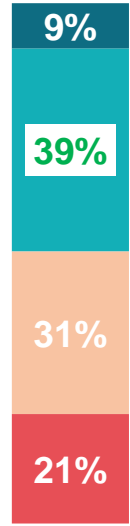
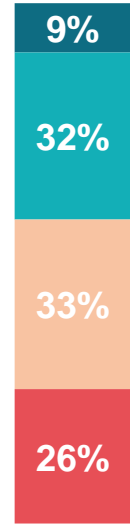
52%

62%

69%

56%

54%





02

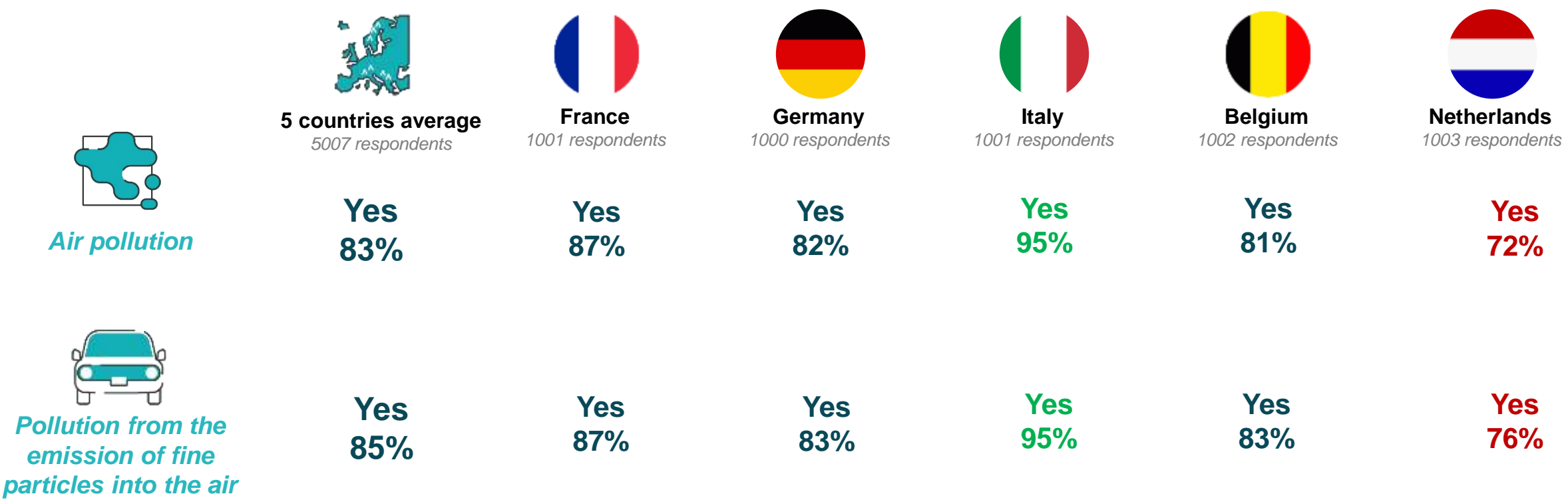
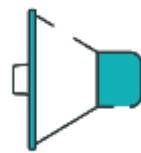
A subject of discussion in each country, Europeans seem convinced that air pollution is explained by transport and industry. There is less agreement on pollution from transport.



In all countries, air pollution and pollution associated with fine particles from vehicles have similar visibility in the media, which is high.

C3: Is **AIR POLLUTION** in general an **issue you hear about in the media** or one you **discuss with those around you** (family, friends, colleagues)?

C4: And would you say that **POLLUTION from the emission of fine particles into the air**, generated by vehicles (cars, scooters, vans, trucks, buses, metros), is a subject you **hear about in the media** or **discuss with those around you** (family, friends, colleagues)?





Only half of French, Belgian and Dutch respondents feel they are well informed about the health risks associated with air pollution, compared to two-thirds in Germany and 80% in Italy.

D4: Do you currently feel Very well informed, Quite well informed, Quite uninformed or Very uninformed about the health risks associated with air pollution and fine particle emissions?



Total Well informed

- Very well informed ●
- Quite well informed ●
- Quite uninformed ●
- Very uninformed ●

Total Uninformed



5 countries average
5007 respondents



France
1,001 respondents



Germany
1,000 respondents



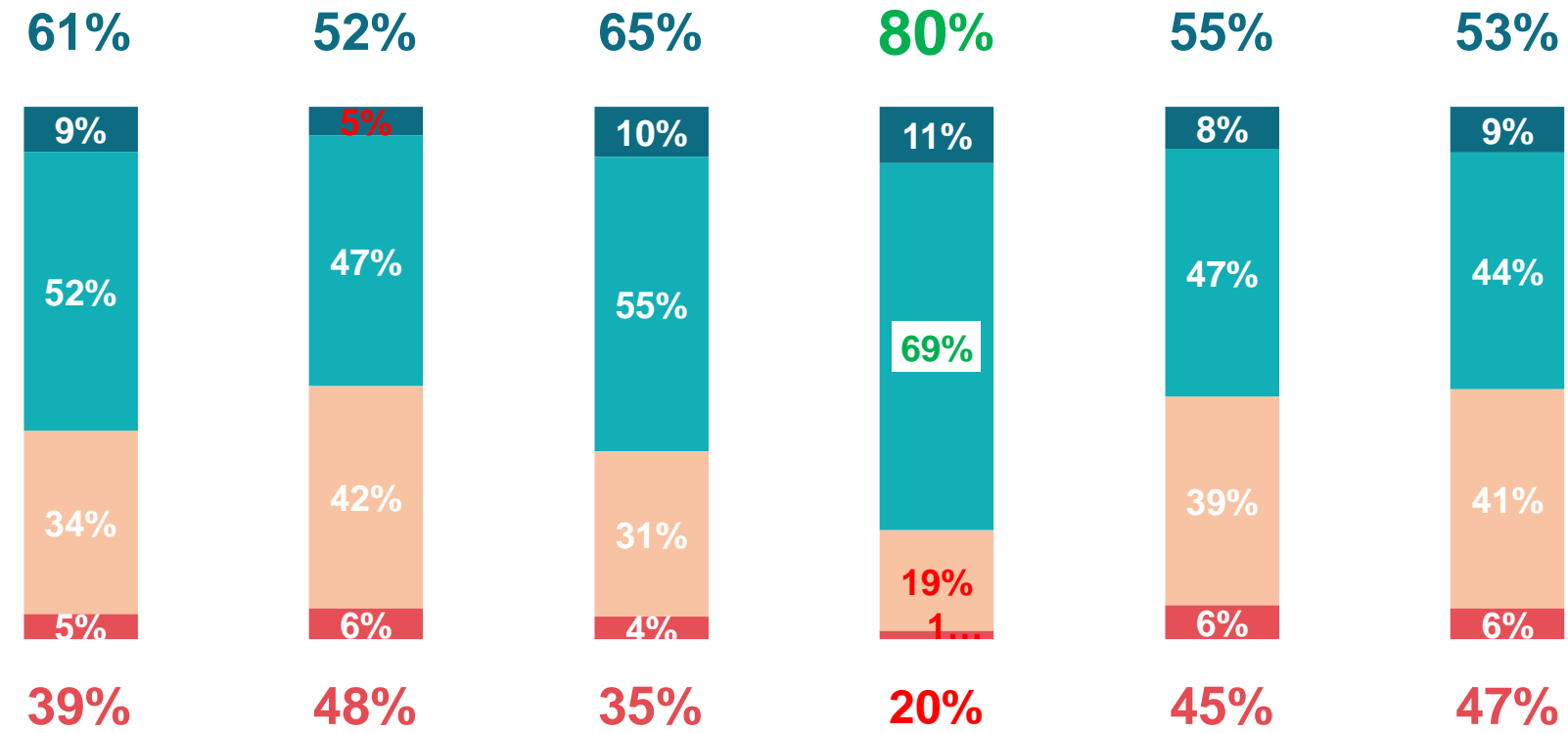
Italy
1,001 respondents



Belgium
1,002 respondents

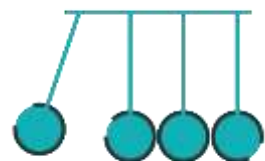


Netherlands
1,003 respondents




“ According to inhabitants, transport and industry are the two main sources of air pollution.

D2: In your opinion, what are the **THREE MAIN REASONS** that may explain outdoor air pollution?



● First place
○ In total

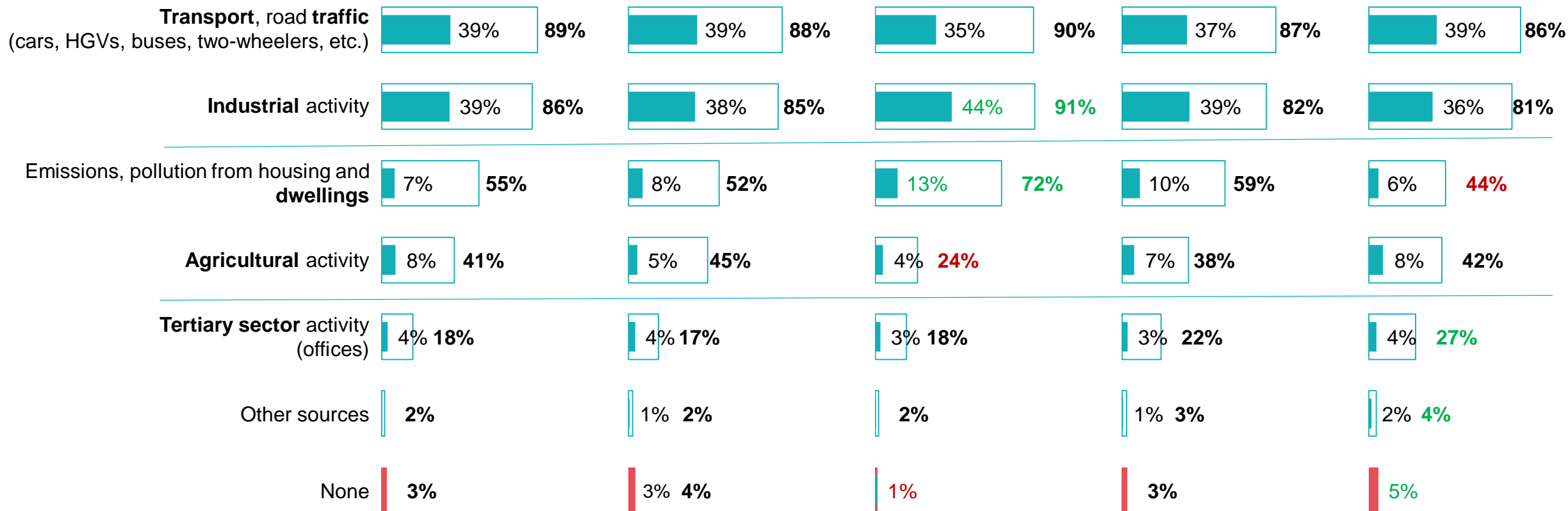
 **France**
1,001 respondents

 **Germany**
1,000 respondents

 **Italy**
1,001 respondents

 **Belgium**
1,002 respondents

 **Netherlands**
1,003 respondents

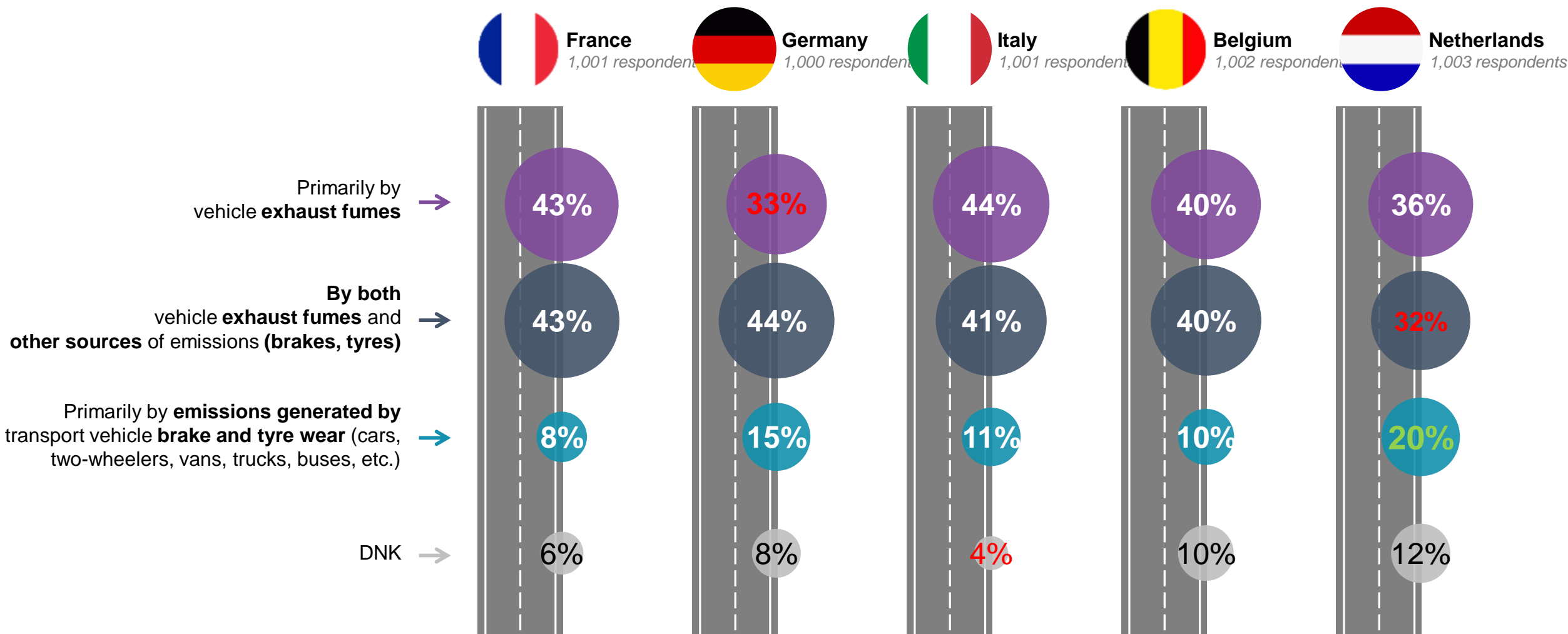




Few Europeans, especially the French, are aware that brake and tyre wear generates emissions that contribute to air pollution.



D3: In your opinion, **air pollution associated with transport** in towns and cities is explained...





03

Who are the actors and what are the solutions for fighting air pollution?



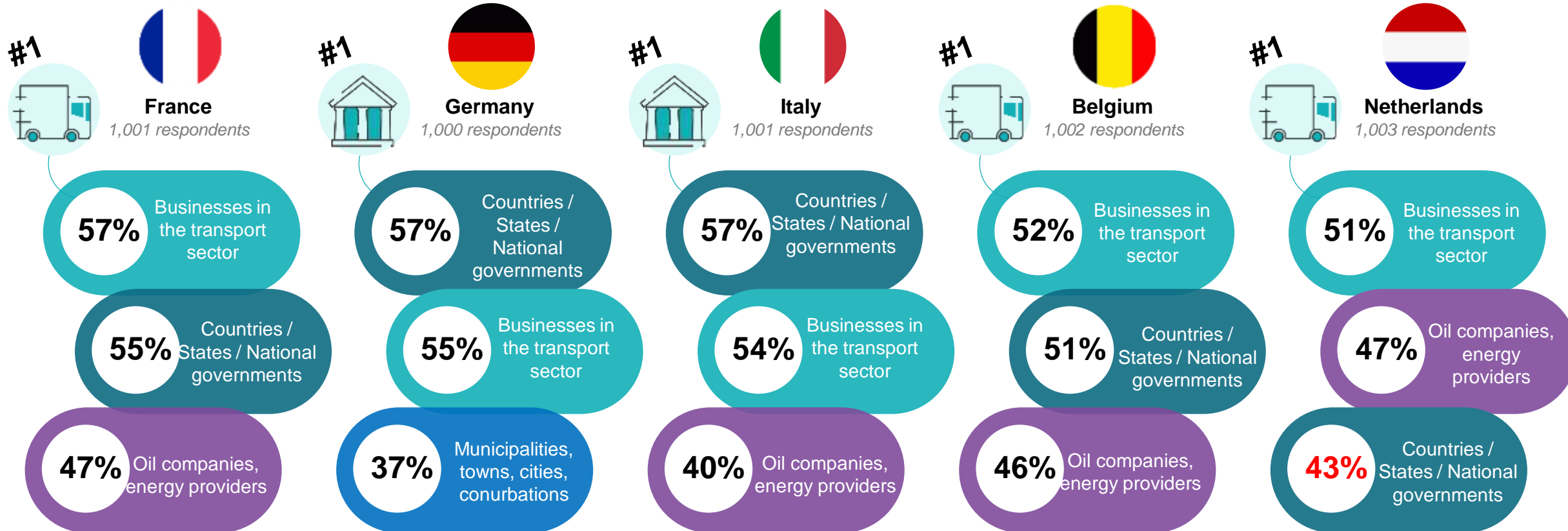
Private businesses and public actors are all working to find solutions that meet Europeans' expectations.



E1: From the following list, please indicate the **THREE ACTORS** who, in your opinion, should be most involved in fighting pollution and improving air quality?

Up to three responses are permitted, totals over 100%

TOP 3 actors



Europeans across the board seem convinced that various actions, both preventive and regulatory, must be implemented to combat air pollution.



E2: Would you say that each of the following actions to fight air pollution and improve outdoor air quality is Very, Somewhat, Not really or Not at all important?



● Very important
○ Total Important



France

1,001 respondents



Germany

1,000 respondents



Italy

1,001 respondents



Belgium

1,002 respondents



Netherlands

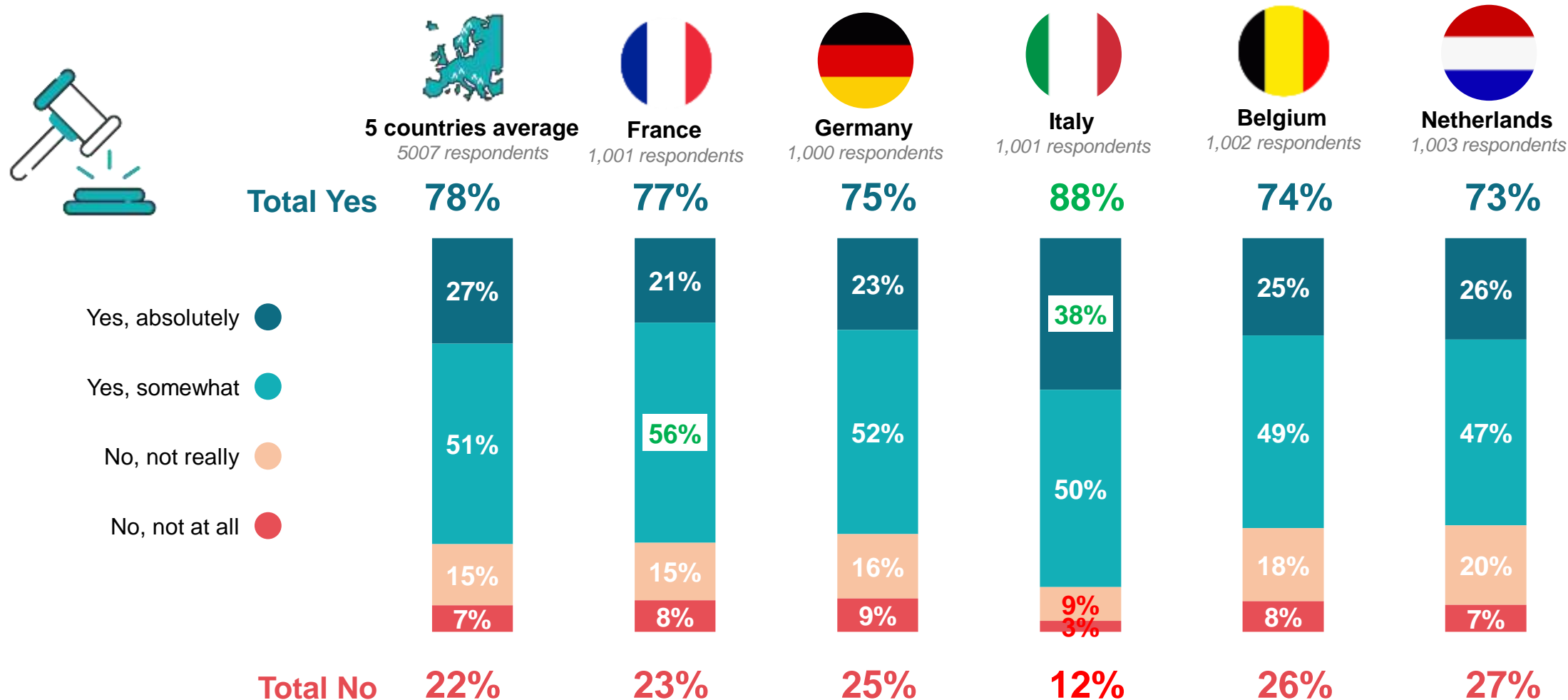
1,003 respondents

Better control over industrial waste disposal	<div><div></div></div> 55%	93%	<div><div></div></div> 50%	89%	<div><div></div></div> 64%	96%	<div><div></div></div> 52%	90%	<div><div></div></div> 49%	90%
Development of renewable energies in businesses, public places and the home	<div><div></div></div> 44%	89%	<div><div></div></div> 50%	88%	<div><div></div></div> 67%	95%	<div><div></div></div> 45%	89%	<div><div></div></div> 41%	88%
Ban on the use of pesticides in agriculture	<div><div></div></div> 44%	86%	<div><div></div></div> 45%	85%	<div><div></div></div> 47%	90%	<div><div></div></div> 39%	84%	<div><div></div></div> 38%	81%
Promotion of the use of public transport by developing mass transit networks (buses, cars, metros, tramways, commuter trains, etc.)	<div><div></div></div> 30%	85%	<div><div></div></div> 32%	80%	<div><div></div></div> 48%	90%	<div><div></div></div> 31%	81%	<div><div></div></div> 30%	83%
Introduction of awareness and prevention campaigns to explain the risks from air pollution	<div><div></div></div> 37%	85%	<div><div></div></div> 45%	86%	<div><div></div></div> 52%	94%	<div><div></div></div> 31%	80%	<div><div></div></div> 31%	81%
Development of networks of cycling paths	<div><div></div></div> 32%	80%	<div><div></div></div> 35%	77%	<div><div></div></div> 40%	82%	<div><div></div></div> 36%	81%	<div><div></div></div> 33%	81%
Ban on the circulation of vehicles that have an impact on the environment and on public health due to their high level of fine particle emissions	<div><div></div></div> 25%	75%	<div><div></div></div> 32%	77%	<div><div></div></div> 46%	89%	<div><div></div></div> 32%	78%	<div><div></div></div> 36%	82%
Promotion of the purchase of renewable electric and/or hybrid vehicles	<div><div></div></div> 24%	70%	<div><div></div></div> 30%	69%	<div><div></div></div> 46%	86%	<div><div></div></div> 24%	70%	<div><div></div></div> 29%	77%
Restriction on the circulation of all diesel and petrol vehicles	<div><div></div></div> 19%	63%	<div><div></div></div> 27%	66%	<div><div></div></div> 31%	77%	<div><div></div></div> 24%	66%	<div><div></div></div> 28%	76%



The introduction of regulations to curb air pollution is welcomed by around 3/4 of inhabitants: 77% of French are in favour of this regulation and 88% among Italians.

E3: As you will be aware, CO2 emissions from vehicles are regulated across Europe. Would you personally like to see regulations introduced to curb air pollution and fight fine particle emissions from private vehicles (cars, scooters, trucks, etc.) and public transport (buses, coaches, metros, trains, etc.), whether they run on petrol, diesel or electricity?





Summary





Health and the impact of air pollution is a cause for concern among Europeans...

- **Health, well-being, is the main concern among 84% of Europeans:** Germany is the only exception with 70% of people concerned.
- **Air pollution, particularly of outdoor air, is a concern for a large majority of Europeans:** 66% are enormously or very concerned. There are some differences between countries: Germany and the Netherlands don't feel so concerned, while Italy is at the top of the list.
- **There is general concern among Europeans about the risks from outdoor air quality,** with Italy topping the list (53% very concerned).

This issue is also central to debate in Europe, although the level of information still needs to be improved...

- In view of the concerns about the topic of **air pollution** in general, and pollution more specifically from fine particle emissions, **it is clearly an issue that Europeans hear about or often discuss with those around them.**
- **Just half of Europeans,** with the exception of Germany (65%) and **Italy (80%), feel well informed about the health risks associated with air pollution.**



... and one on which Europeans are waiting for decisions and action to be taken by both private businesses and public actors.

- According to Europeans in the countries surveyed, **transport is one of the main sectors most responsible for outdoor air pollution** (more than 80% cite them).
- **Europeans feel under informed concerning the sources of pollution from transport: only 8% of French respondents think that brakes and tyres abrasion create emissions that contribute to air pollution; countries in Northern Europe** seem more informed about these kinds of emissions (15% in Germany and 20% in the Netherlands).
- **In terms of the action needed**, Europeans think that it is crucial to **put in place supervision and regulation measures, as well as prevention actions**.
- **3/4 of Europeans** are waiting **for regulations to curb air pollution**: here again, Italians are most favourable (88%).
- The European citizens surveyed are waiting **for decisions to be taken by their national governments and even the European authorities**, together with **the involvement of private businesses considered to be the source of air pollution** (transport and oil companies and those associated with energy production).



Comparative assessment



France

1,001 respondents



Germany

1,000 respondents



Italy

1,001 respondents



Belgium

1,002 respondents



Netherlands

1,003 respondents



% Interested in the environment, ecological transition

75%

69%

89%

74%

72%

...those responding Very

32%

26%

47%

29%

28%



% Concerned about air pollution (outdoor, indoor and in confined spaces)

69%

60%

79%

65%

56%

...those responding Enormously

31%

24%

46%

28%

22%



% Concerned about outdoor air pollution*

75%

70%

80%

69%

63%

...those responding Enormously

33%

29%

46%

30%

25%

% Hear about /discuss pollution from fine particle emissions

87%

83%

95%

83%

76%



Causes of pollution from fine particles

Primarily from exhaust fumes

43%

33%

44%

40%

36%

From both vehicle exhaust fumes and other sources of emissions (brakes, tyres)

43%

44%

41%

40%

32%

Primarily from emissions generated by transport vehicle brake and tyre wear

8%

15%

11%

10%

20%



% Informed about the health risks from air pollution

52%

65%

80%

55%

53%

% Wanting to see regulations introduced

77%

75%

88%

74%

73%

(*) base: concerned about air pollution

WE ARE DIGITAL!

Founded in 2000 on an idea that was radically innovative for its time, OpinionWay was a pioneer in renewing the practices of the marketing research and opinion survey business.

Bolstered by steady growth since its inception, the company has continued to open up new horizons to better address all marketing and societal challenges by incorporating Social Media Intelligence, the use of smart data, creative co-construction dynamics, community-based approaches and storytelling in its methodologies.

Today, OpinionWay is pursuing its growth dynamic through geographical expansion in the high-potential regions of Eastern Europe and Africa.



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This is the mission that drives OpinionWay's teams and forms the basis for the relationships they forge with their clients.

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